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Introduction to Microsoft Dynamics CRM 2013

Microsoft

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01 | Course Introduction

Microsoft Dynamics CRM Overview

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Microsoft

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Module 1: Dynamics CRM Overview

- Microsoft Dynamics CRM Functionality
- Deployment Options
- Forms, Fields, Records & Entities
- Entity Relationship Model
- Navigation

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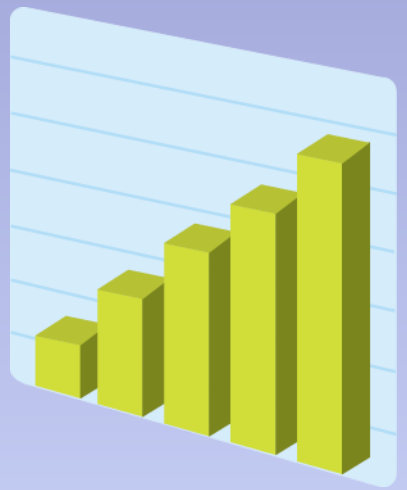
Dynamics CRM Functionality

- Support Sales, Marketing & Service
- Customizable
- Marketplace

CRM Functional Areas

Sales



Marketing

Customer Care

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Sales Functionality

- Leads
- Opportunities
- Communication tracking
- Product database
- Sales processes

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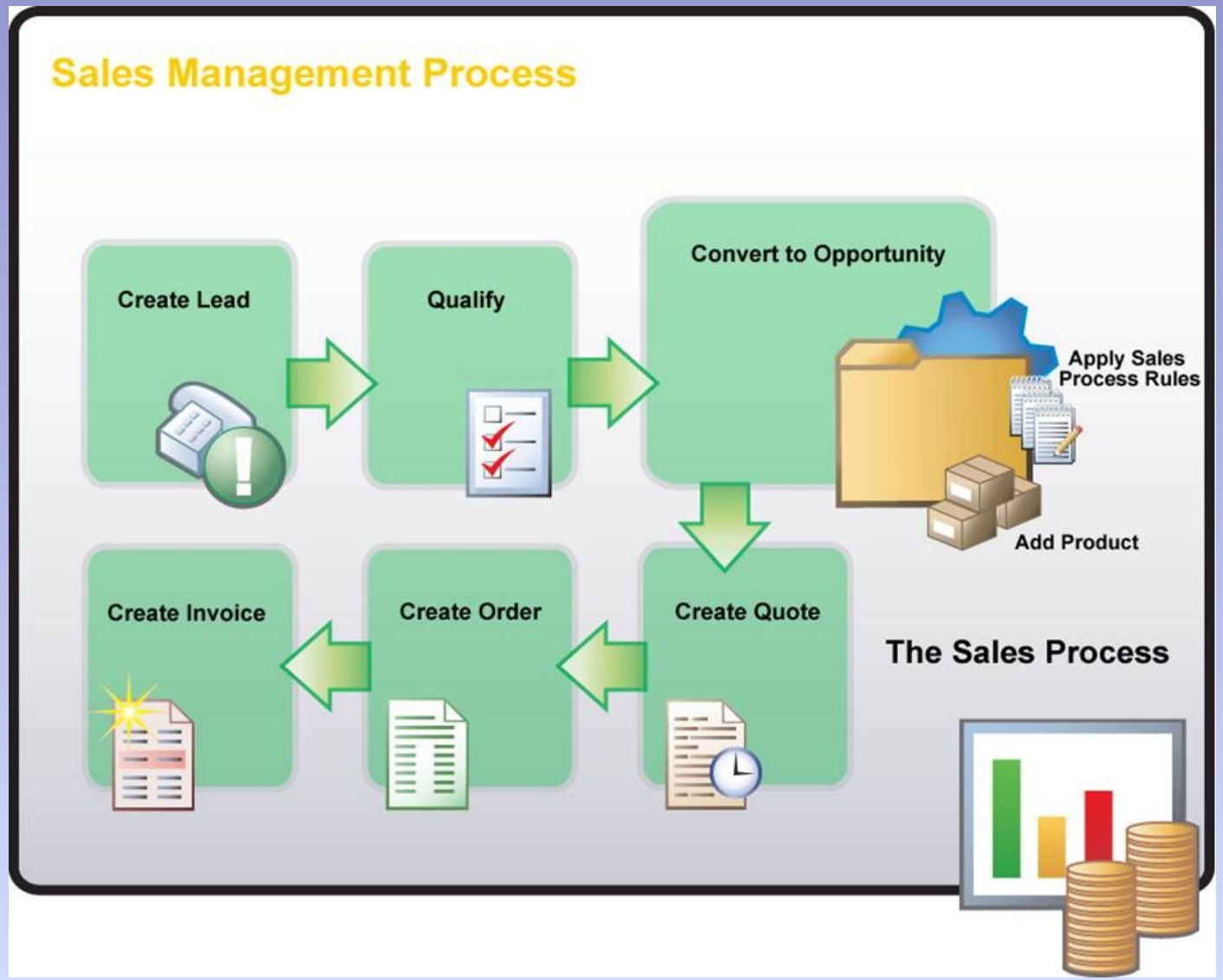
Sales Process



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Client Care Functionality

- Case Recording
- Contract Management
- Services & Resources Management
- Appointment Scheduling
- Knowledge Base

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Marketing Functionality

- Planning & Budgeting
- Marketing Lists
- Campaigns
- Tracking and Reporting

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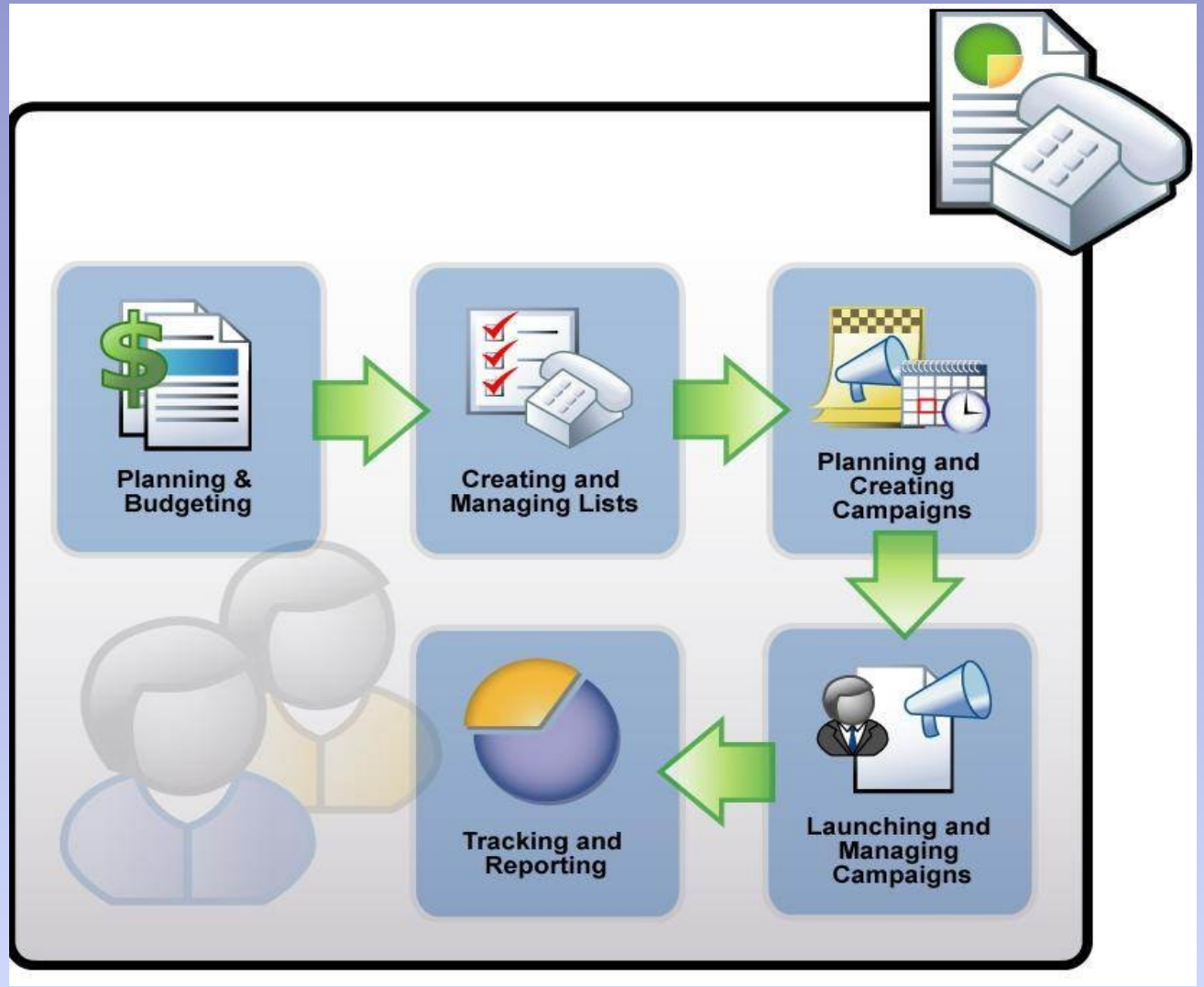
Marketing Process



CRM Functional Areas

Sales

- Leads
- Opportunities
- Communication
- Database
- Process

Marketing

- Planning
- Budgeting
- Marketing Lists
- Campaigns
- Tracking
- Reporting

Customer Care

- Cases
- Contracts
- Resource Mgmt.
- Scheduling
- Knowledge Base

Deployment Options and Clients

- Deployment Options
- Web Client
- Outlook Client
- Mobile & Tablet Client

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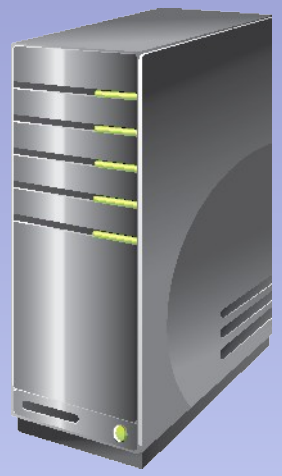
Deployment Options



On-Premise

Online/Cloud

Partner Hosted

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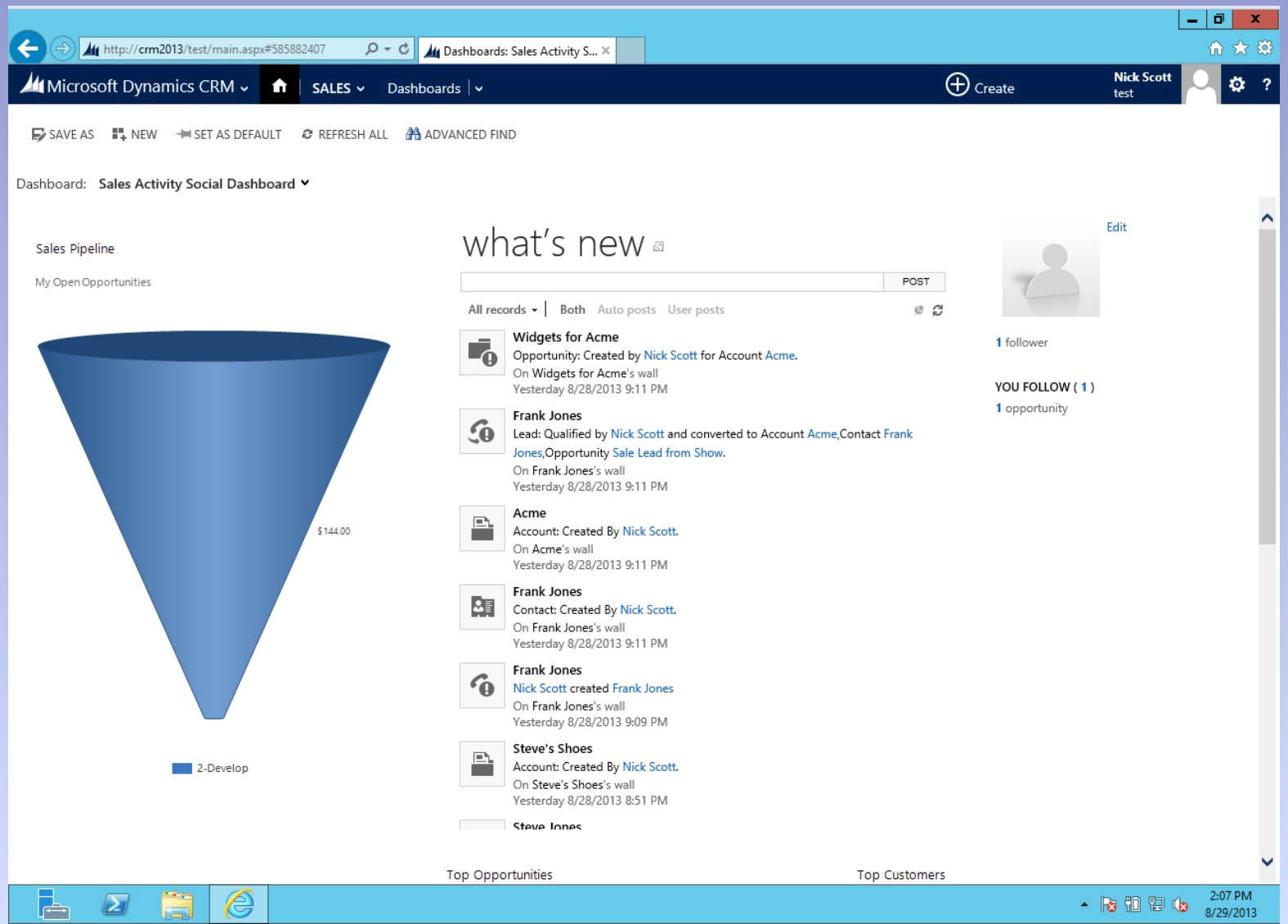
Web Client



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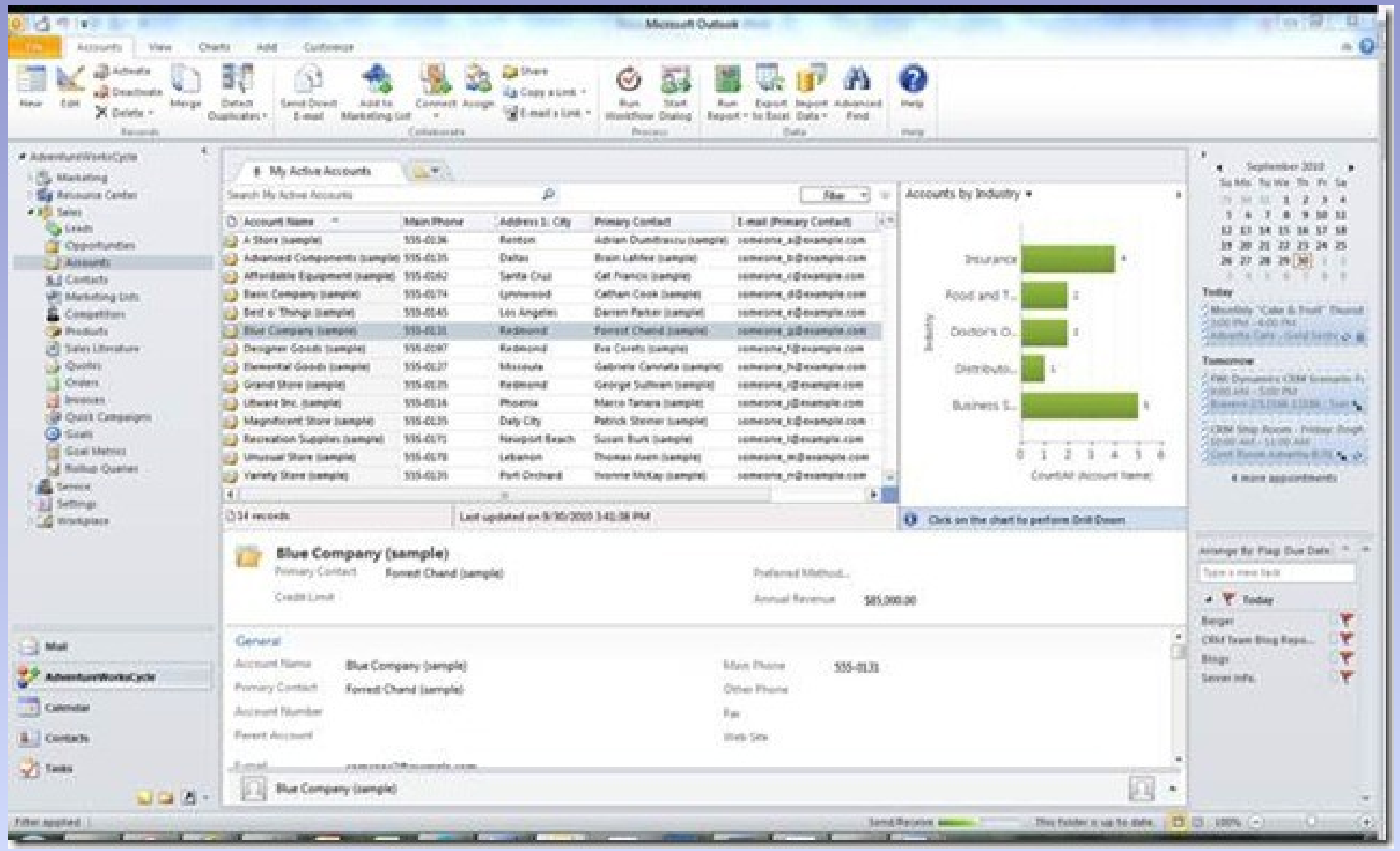
Outlook Client



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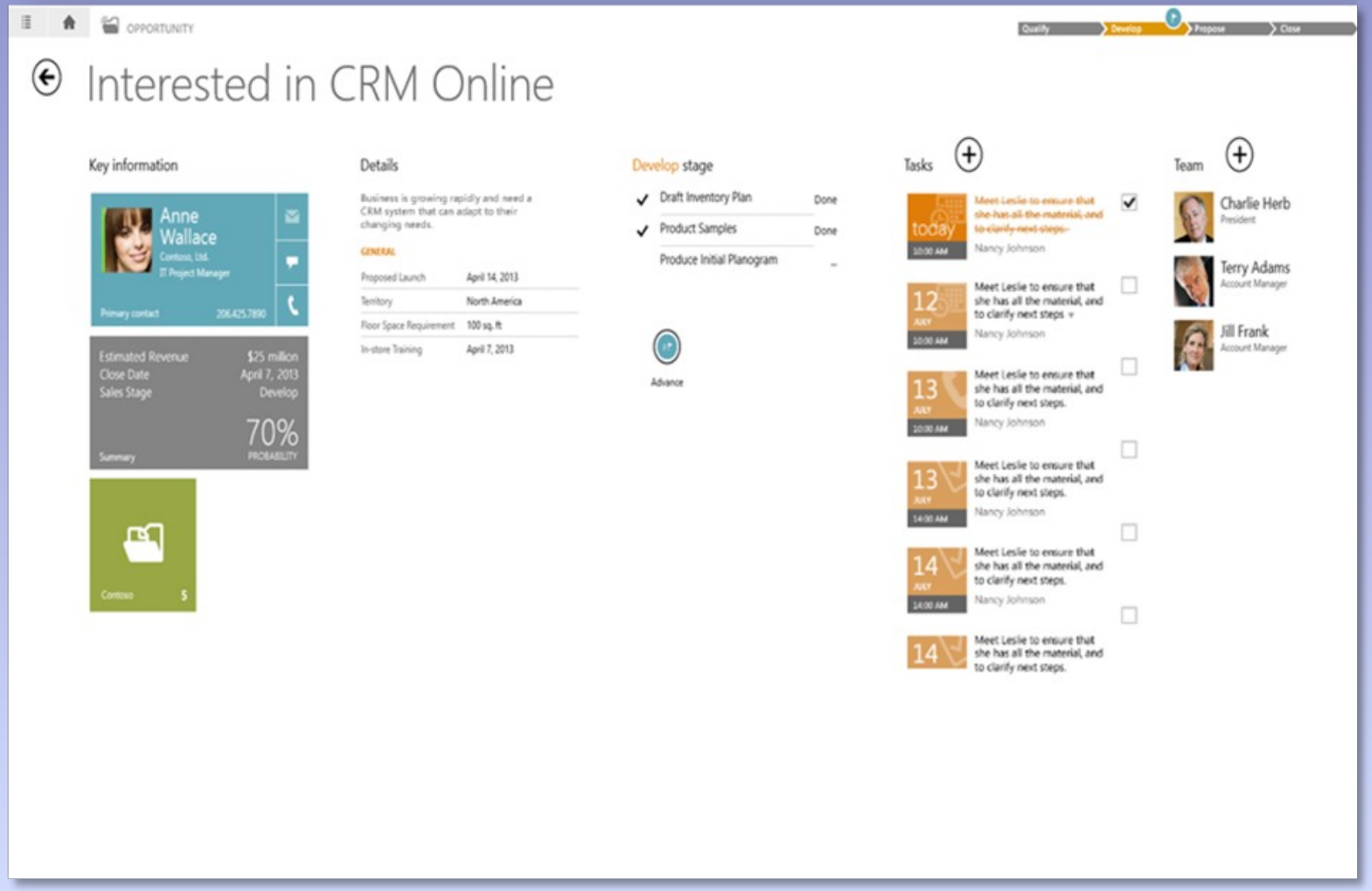
Mobile Client



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Deployment and Clients

- Deployment options
  - On-Premise
  - Cloud
  - Partner hosted

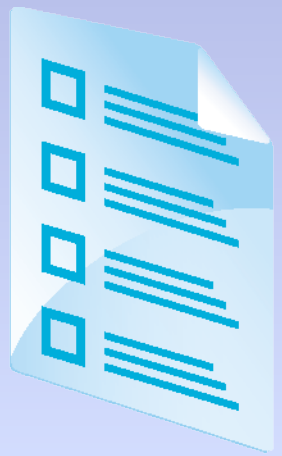
- Access CRM
  - Web
  - Outlook
  - Mobile/Tablet App

Entity, Form, Field & Record

Entity

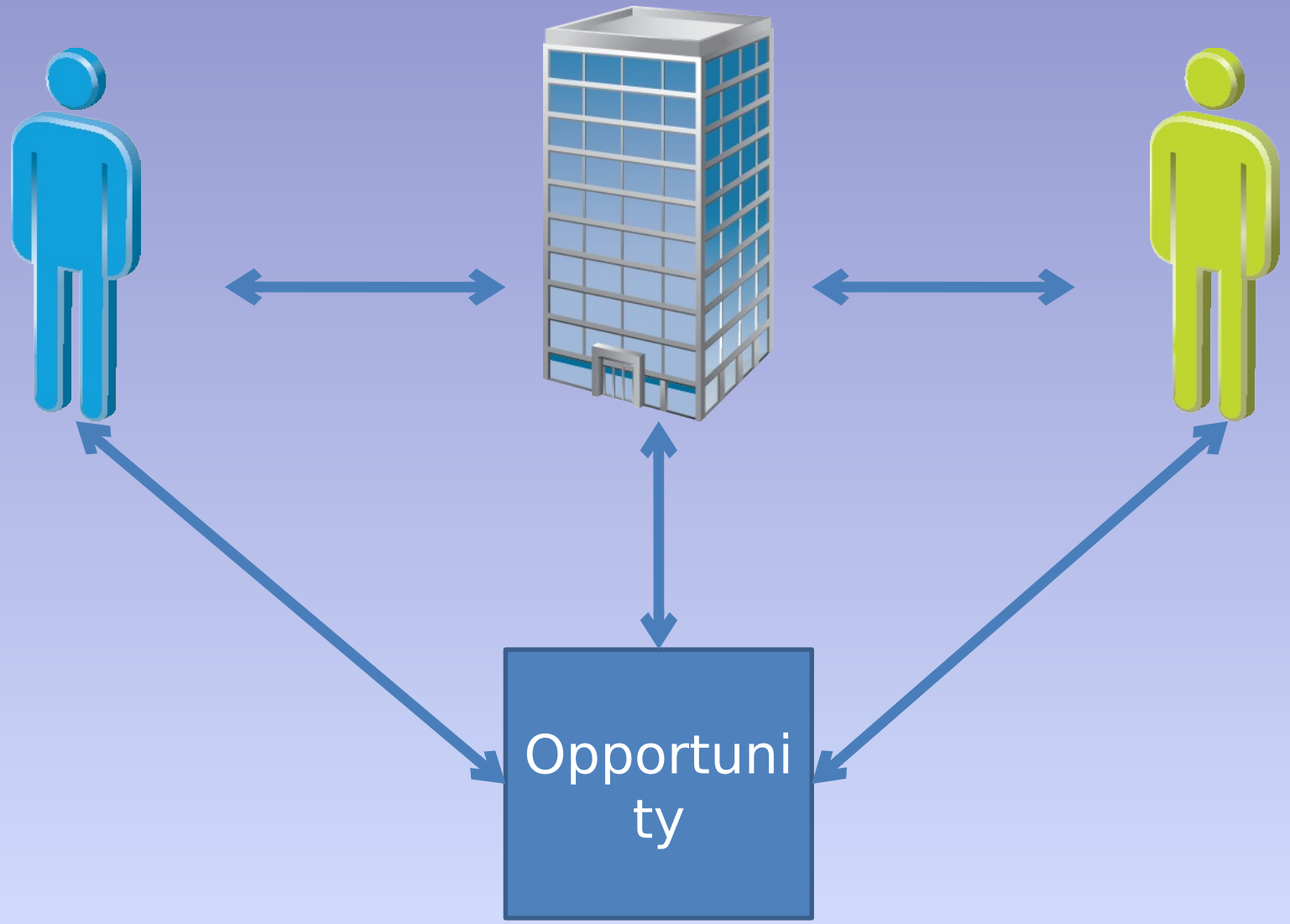
Field

Form

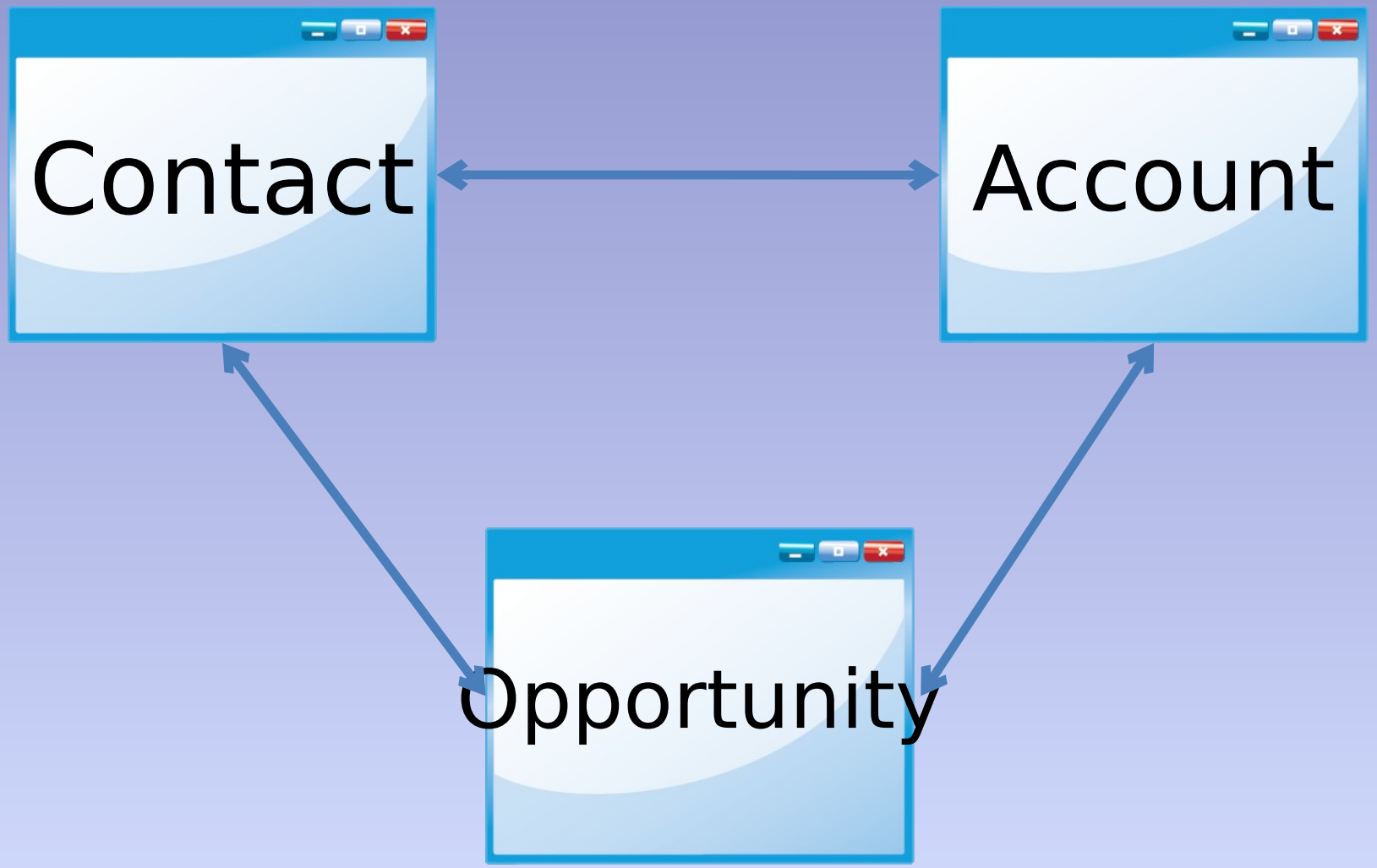


Record

Entity Relationships Example



Entity Relationships



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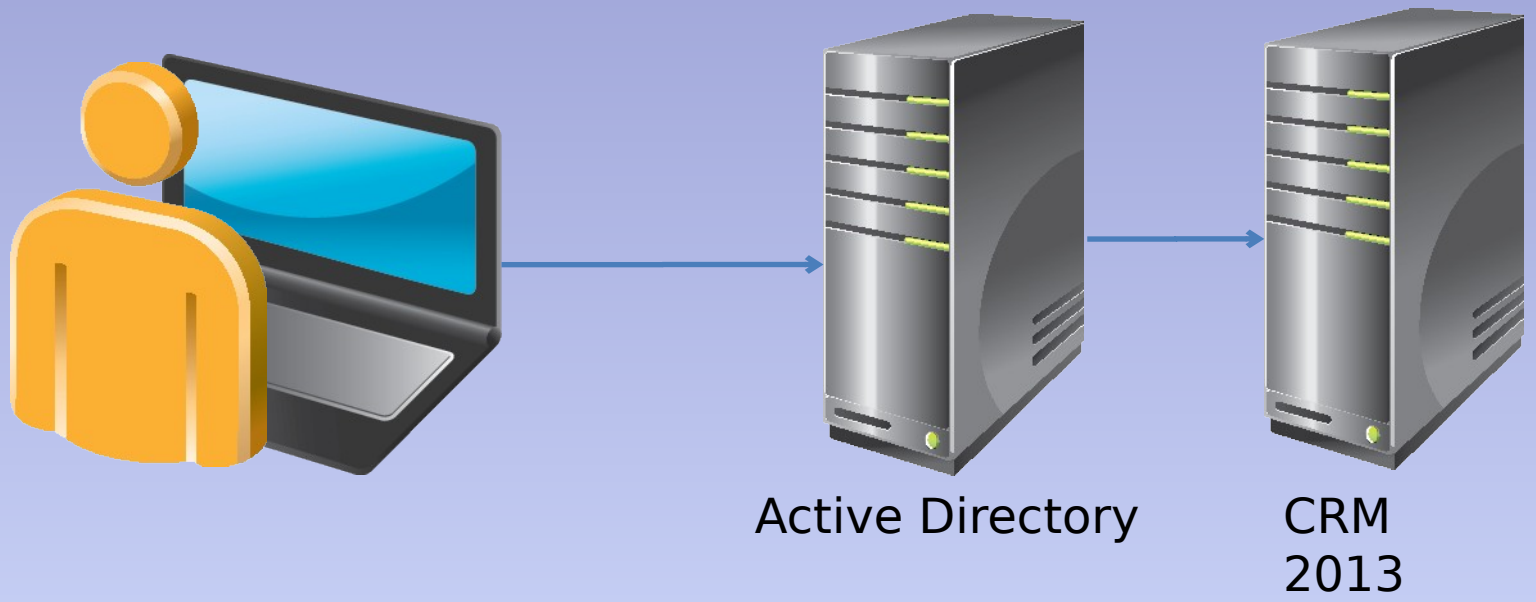
Dynamics CRM 2013 Security



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Navigating Dynamics CRM

- Basic Navigation
- Working with Records
- Navigating within a Record

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